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**CONSIDERATION must be given to the “how to”  
for O&M in the planning phase of our projects**

□ *Agenda*

- Common Challenges
- OBO Initiatives
- State University Actions
- Case Study 1: University of California Berkeley
- Case Study 2: University of Florida

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# **OBO and Major State University**

## **O&M: Common Challenges**

- Rising Customer Demands for IT, Comfort, Work Order Responsiveness
- Higher Energy Costs
- Higher Construction Material Costs
- Tight O&M Appropriations
- New Construction = More Complex Building Systems
- Fierce Competition for O&M \$ vs New Construction/Research \$\$\$

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## *OBO initiatives for O&M planning*

- OBO has an integrated plan for O&M Planning
- Maintainability reviews of design documents
  - ProjNet interactions among design team
  - Value Engineering reviews
  - Maintenance Staffing Studies at posts
  - Training new FMs on O&M checklist
  - Monthly CC:FAC working group meetings
  - Vetting 1<sup>st</sup> year required specialty maintenance equipment for warranty

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## Common Themes: Strategies of State University Facilities Management

- ❑ One simple O&M budget in \$/sq ft covering low & high tech buildings is totally un-realistic
- ❑ Regularly scheduled walk-thrus/involvement by O&M staff during construction is crucial to get their “buy-in”
- ❑ Useful facilities-centered website is essential for contractors and O&M staff to learn updates to changes in construction and O&M standards
- ❑ Effective “customer-focused” training of O&M staff has shown major benefits in reducing customer concerns
- ❑ Owner-contracted Commissioning results in fewer warranty claims & fewer contractor call-backs

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## Initiatives for O&M Input in Design: University of California Berkeley

- ❑ Senior Physical Plant staff involved in all phases of design reviews, with single POC between O&M reviewers and design team
- ❑ Condition assessments by experienced O&M staff provided realistic \$\$ figure of Deferred Maintenance
- ❑ Consolidated Agreements with mfgrs/ distributors results in better long-term value
- ❑ Tracking services to current O&M costs shows customers what they can receive – “We don’t do windows”, unless they pay for it
- ❑ Staff evaluations includes results from customer service surveys

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## Initiatives for O&M Input in Design: University of Florida

- ❑ U of FL facilities website has design & construction standards beyond code compliance for ready access by contractors and O&M staff
- ❑ Commissioning (owner-contracted) is now standard practices for all building systems
- ❑ Specific time & day set up for O&M staff to walk-around construction site to identify & locate future hidden/covered wiring, piping, cables, distribution components
- ❑ Substantial completion checklist is in 25 sections with milestones for use by O&M staff & contractors
- ❑ Spec for energy modeling during design includes “what - ifs” to identify best payback